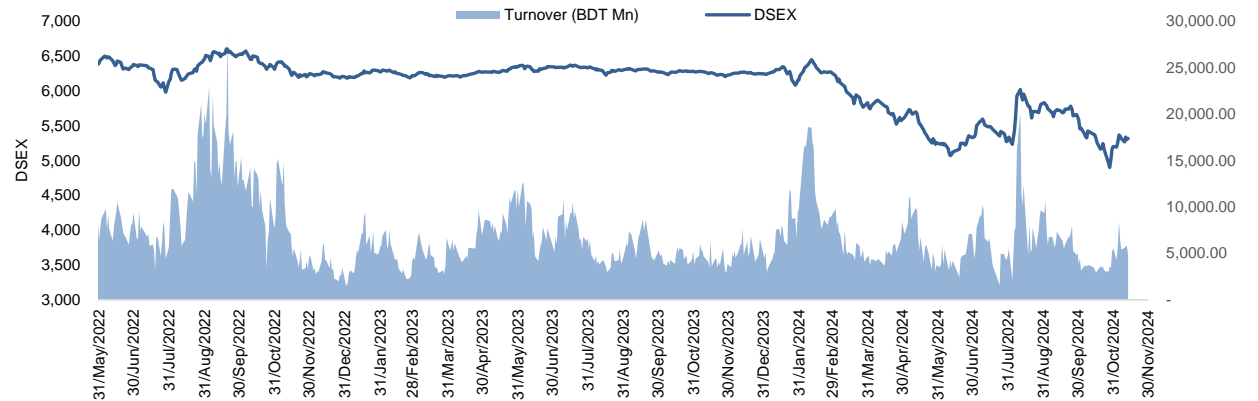


Daily Market Update

The market closed in green today. The benchmark index DSEX (+0.33%) gained 17.65 points and closed at 5,316.02. The blue-chip index DS30 (+0.11%), the Shariah-based index DSES (+0.17%), and the large-cap index CDSET (+0.13%) closed at 1,972.20, 1,184.96, and 1,091.27 points, respectively. Large-cap sectors posted mixed performance today. Engineering booked the highest gain of 0.28%, followed by Bank (+0.16%), Pharmaceutical (+0.07%), Fuel & Power (-0.02%), NBFI (-0.63%), Food & Allied (-0.71%), and Telecommunication (-1.02%), respectively. Block trades contributed 2.5% of the overall market turnover. Square Pharmaceuticals Ltd. (+0.2%) was the most traded share with a turnover of BDT 241 million.



Index	Closing	Opening	Point Δ	%Δ	YTD %Δ
DSEX	5,316.02	5,298.37	+17.65	+0.33%	-14.9%
DS30	1,972.20	1,970.10	+2.10	+0.11%	-5.8%
DSES	1,184.96	1,183.00	+1.95	+0.17%	-13.1%
CDSET	1,091.27	1,089.84	+1.43	+0.13%	-9.3%

Figure: Sectorial Turnover (BDT Mn)

■ Day before Yesterday's Turnover ■ Yesterday's Turnover ■ Today's Turnover

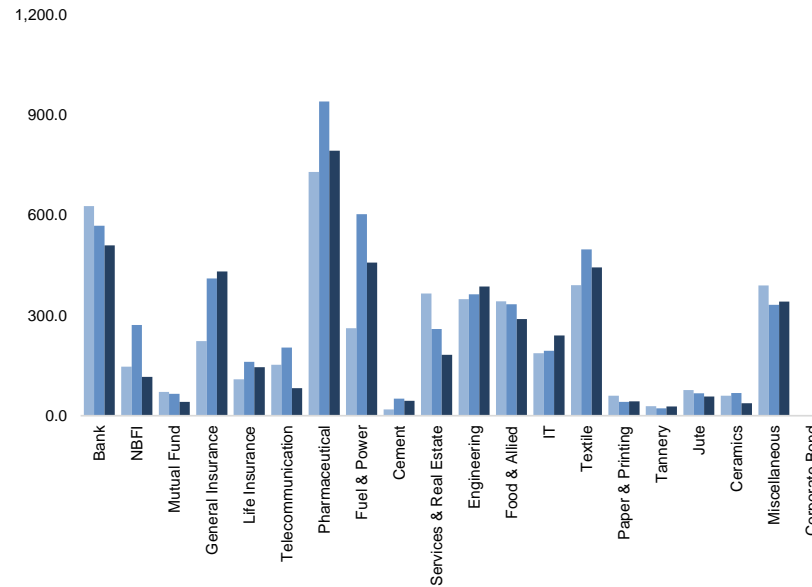
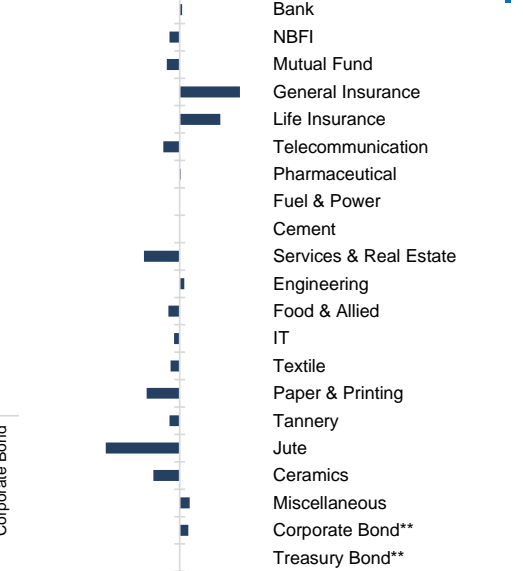


Figure: Sectorial Mcap Change

-10% -5% 0% 5%



Market PE 15.1x
Market PB 1.2x

	Advanced	Declined	Unchanged	Total
All Category	152	175	67	394
A Category (Equity)	105	95	30	230
B Category (Equity)	25	42	15	82
N Category (Equity)	1	3	0	4
Z Category (Equity)	21	35	22	78
Mutual Funds	6	17	14	37
Corporate Bonds	1	1	0	2
Treasury Bonds	1	0	0	1

* Based on Traded Scrips

		Today	Last Day	Daily %Δ
Mcap	Mn BDT	6,716,037	6,720,024	-0.1%
	Mn USD	55,967	56,000	
Turnover	Mn BDT	4,799	5,777	
	Mn USD	40	48	-16.9%
Volume	Mn Shares	140	172	-18.8%
	No. of Trade	161,189	177,398	-9.1%

* Average Interbank Exchange Rate is BDT 120.00 as of Nov 13, 2024

Fahim Hassan Research Analyst (891) 1709636546 fahim.hassan@bracepl.com	Md Istiaz Uddin Research Associate (891) 1708915202 mistiaz.uddin@bracepl.com
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* Market P/E and P/BV calculation excludes Mutual Fund, Life Insurance, and NBL

Sector Index	Closing	Opening	Points Δ	%Δ	No. of Companies	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	% of Total Turnover	PE	PB	Top Twenty Market Cap	Mcap (BDT Mn)	% of Total Mcap	Turnover (BDT Mn)	PE	PB
Bank	1,472	1,470	+2.34	+0.16%	36	696,679	10.4%	509.7	10.9%	8.9x	0.7x	GP	439,523	12.0%	48.7	12.4x	7.6x
NBFI	1,262	1,270	-8.04	-0.63%	23	120,298	1.8%	116.0	2.5%	NM	NM	BATBC	201,528	5.5%	58.2	11.5x	3.3x
Mutual Fund	609	614	-4.95	-0.81%	37	27,978	0.4%	41.1	0.9%	NM	0.5x	SQURPHARMA	198,920	5.4%	241.4	9.5x	1.6x
General Insurance	2,896	2,791	+105.20	+3.77%	43	82,682	1.2%	431.2	9.2%	15.0x	1.3x	WALTONHIL	148,223	4.0%	8.4	11.4x	1.3x
Life Insurance	1,979	1,930	+49.04	+2.54%	15	52,623	0.8%	145.4	3.1%	NM	NM	ROBI	137,758	3.8%	29.8	25.0x	2.1x
Telecommunication	5,110	5,163	-52.68	-1.02%	3	599,201	9.0%	82.5	1.8%	14.2x	4.3x	BEXIMCO	103,842	2.8%	0.0	NM	1.2x
Pharmaceutical	3,015	3,013	+2.17	+0.07%	34	571,568	8.5%	792.5	16.9%	14.1x	1.6x	ISLAMIBANK	93,218	2.5%	143.4	20.0x	1.3x
Fuel & Power	1,147	1,147	-0.21	-0.02%	23	303,588	4.5%	458.2	9.8%	15.6x	0.6x	BRACBANK	90,078	2.5%	55.3	8.1x	1.2x
Cement	2,018	2,018	+0.12	+0.01%	7	96,160	1.4%	44.8	1.0%	16.7x	2.1x	BERGERPBL	82,349	2.2%	0.7	24.7x	5.2x
Services & Real Estate	1,099	1,124	-25.11	-2.23%	9	60,441	0.9%	182.4	3.9%	20.7x	0.4x	RENATA	75,528	2.1%	3.5	20.9x	2.2x
Engineering	2,538	2,531	+7.14	+0.28%	42	286,359	4.3%	386.6	8.3%	12.7x	0.9x	MARICO	73,433	2.0%	1.7	13.9x	9.6x
Food & Allied	17,360	17,484	-124.04	-0.71%	21	317,635	4.7%	289.1	6.2%	16.9x	4.5x	LHB	62,482	1.7%	13.4	15.5x	3.1x
IT	2,051	2,058	-7.39	-0.36%	11	27,051	0.4%	240.2	5.1%	18.9x	1.8x	ICB	55,765	1.5%	14.9	NM	1.3x
Textile	1,101	1,108	-6.30	-0.57%	58	114,338	1.7%	443.3	9.5%	NM	0.8x	UNILEVERCL	50,117	1.4%	0.5	68.2x	21.3x
Paper & Printing	4,153	4,241	-87.82	-2.07%	6	18,765	0.3%	43.4	0.9%	45.7x	0.8x	DUTCHBANGL	41,217	1.1%	4.9	6.6x	0.8x
Tannery	1,970	1,983	-12.56	-0.63%	6	21,952	0.3%	27.8	0.6%	65.2x	1.5x	BXPHARMA	37,696	1.0%	81.0	6.4x	0.8x
Jute	15,566	16,320	-754.77	-4.62%	3	3,426	0.1%	57.8	1.2%	NM	NM	POWERGRID	36,735	1.0%	2.5	NM	0.2x
Ceramics	361	367	-6.07	-1.65%	5	16,205	0.2%	37.7	0.8%	NM	1.0x	EBL	32,595	0.9%	9.1	5.0x	0.7x
Miscellaneous	4,247	4,221	+26.18	+0.62%	15	230,648	3.4%	341.1	7.3%	38.3x	1.8x	MJLBD	32,214	0.9%	161.6	10.8x	2.0x
Corporate Bond**	10,832	10,773	+58.51	+0.54%	16	34,606	0.5%	0.1	0.0%	NM	NM	OLYMPIC	31,950	0.9%	28.4	17.4x	2.8x
Treasury Bond**	450	450	+0.02	+0.01%	236	3,006,570	44.9%	9.6	0.2%	NM	NM						

Top Ten Gainers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ZEALBANGLA	102.5	+10.0%	1.9	NM	NM
DGIC	24.3	+10.0%	7.6	30.0x	1.9x
NORTHRNINS	31.2	+9.9%	3.2	17.0x	1.3x
INTRACO	17.9	+9.8%	54.2	21.6x	1.4x
CONFIDCEM	52.6	+9.8%	24.6	6.0x	0.7x
MEGHNAINS	26.0	+9.70%	14.0	22.4x	1.9x
PHENIXINS	27.0	+8.4%	3.1	26.0x	1x
WMSHIPYARD	7.0	+7.7%	9.4	#####	0.4x
ORIONINFU	311.5	+7.7%	46.0	NM	20.9x
KDSALTD	35.2	+7.6%	23.2	15.7x	1.3x

Top Ten Losers	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
ANWARGALV	70.0	-9.8%	30.4	94.6x	7.6x
ESQUIRENIT	21.1	-9.1%	10.6	25.4x	0x
USMANIAGL	33.1	-8.1%	0.0	NM	0.5x
GHCL	26.0	-6.5%	33.3	NM	0.6x
NCCBLMF1	5.0	-5.7%	0.5	NM	0.6x
SPCL	37.3	-5.6%	22.4	16.1x	1.0x
SONALIANS	262.9	-5.3%	57.6	30.6x	3.9x
NEWLINE	13.3	-5.0%	0.3	25.6x	0.5x
ARAMITCEM	11.5	-5.0%	0.6	NM	NM
SAMATALETH	39.3	-4.8%	0.6	NM	2.8x

Top Twenty Free Float Mcap	Free Float Mcap (BDT Mn)	% of Total Free Float Mcap	PE	PB
SQURPHARMA	117,112	8.6%	9.5x	1.6x
BEXIMCO	69,460	5.1%	NM	1.2x
BATBC	45,948	3.4%	11.5x	3.3x
RENATA	35,002	2.6%	20.9x	2.2x
ISLAMIBANK	33,649	2.5%	20.0x	1.3x
BXPHARMA	32,479	2.4%	6.4x	0.8x
BRACBANK	32,157	2.4%	8.1x	1.2x
GP	30,004	2.2%	12.4x	7.6x
LHB	24,690	1.8%	15.5x	3.1x
EBL	24,199	1.8%	5.0x	0.7x
PUBALIBANK	20,448	1.5%	3.3x	0.6x
NBL	16,930	1.2%	NM	2.8x
CITYBANK	16,830	1.2%	4.0x	0.7x
BSRMLTD	14,210	1.0%	4.8x	0.5x
ALARABANK	13,534	1.0%	13.1x	0.9x
PRIMEBANK	12,985	1.0%	4.2x	0.7x
OLYMPIC	12,616	0.9%	17.4x	2.8x
UTTARABANK	11,350	0.8%	7.4x	0.7x
ORIONPHARM	11,317	0.8%	9.9x	0.5x
ROBI	10,738	0.8%	25.0x	2.1x

Most Traded Share	Close Price (BDT)	Δ%	Turnover (BDT Mn)	PE	PB
SQURPHARMA	224.4	+0.2%	241.4	9.5x	1.6x
BSC	101.2	+6.0%	215.7	5.3x	0.9x
FEKDIL	21.3	-	177.3	13.0x	1.0x
MJLBD	101.7	+2.3%	161.6	10.8x	2.0x
ISLAMIBANK	57.9	+0.7%	143.4	20.0x	1.3x
MPETROLEUM	218.9	-1.1%	142.6	4.0x	0.9x
KBPPWBIL	159.8	+2.8%	108.3	NM	13.5x
AGNISYSL	32.8	-2.7%	95.3	30.7x	2.0x
IBNSINA	298.2	-3.6%	81.2	15.7x	2.6x
BXPHARMA	84.5	-1.7%	81.0	6.4x	0.8x

Block Trade	Maximum Price (BDT)	Minimum Price (BDT)	No. of Trade	Quantity ('000)	Turnover (BDT Mn)
BEACHHATCH	91.5	85.0	10.0	505	44.57
IBNSINA	310.0	301.2	5.0	49	14.82
CITYGENINS	44.2	44.2	1.0	261	11.54
MIDLANDBNK	33.5	31.5	3.0	251	8.09
1STPRIMFMF	37.3	37.3	2.0	135	5.04
RENATA	714.1	710.1	3.0	5	3.33
SONALIANS	301.0	301.0	1.0	11	3.21
FINEFOODS	169.0	169.0	2.0	18	3.04
LOVELLO	87.0	82.6	2.0	30	2.52
NAVANACNG	24.2	24.2	1.0	100	2.42

* NBFI Sector PE calculation methodology has been modified to reflect positive earnings only.
 ** The base of the Bond index starts at 100, starting from Jan 13, 2022
 Similarly, Treasury Bond Index starts at 100, starting from Oct 10, 2022

Block Trade	Maximum Price (BDT)	Minimum Price	Turnover (BDT Mn)	Quantity ('000)	No. of Trade
BEACHHATCH	91.5	85.0	44.6	505	10
IBNSINA	310.0	301.2	14.8	49	5
CITYGENINS	44.2	44.2	11.5	261	1
MIDLANDBNK	33.5	31.5	8.1	251	3
1STPRIMFMF	37.3	37.3	5.0	135	2
RENATA	714.1	710.1	3.3	5	3
SONALIANSH	301.0	301.0	3.2	11	1
FINEFOODS	169.0	169.0	3.0	18	2
LOVELLO	87.0	82.6	2.5	30	2
NAVANACNG	24.2	24.2	2.4	100	1
WALTONHIL	499.8	499.8	2.4	5	1
ICB	71.2	71.2	2.4	33	1
RELIANCE1	18.0	17.5	2.3	130	3
KBPPWBIL	150.0	142.0	1.6	11	2
MJLBD	100.4	100.4	1.4	14	1
CENTRALINS	49.2	49.1	1.2	25	2
SALVOCHEM	26.5	26.5	0.9	35	1
SALVOCHEM	26.5	26.5	0.9	35	1
ACFL	18.0	18.0	0.9	50	1
PRAGATILIF	180.1	180.1	0.7	4	1
UNIONBANK	5.7	5.7	0.6	100	1
ORIONINFU	283.1	283.1	0.6	2	1
Total			118.2		54

Upcoming Corporate Events

DSE Ticker	Right Share	Dividend		Event	Date
		Stock	Cash		
FEKDIL		0.0%	14%	Record Date	14-Nov-24
RAHIMTEXT		0.0%	10%	Record Date	14-Nov-24
BSRMLTD		0.0%	35%	Record Date	14-Nov-24
BSRMSTEEL		0.0%	32%	Record Date	14-Nov-24
KDSALTD		5.0%	5%	Record Date	14-Nov-24
HAKKANIPUL		0.0%	2%	Record Date	14-Nov-24
BBSCABLES		0.0%	1%	Record Date	14-Nov-24
ITC		0.0%	11%	Record Date	14-Nov-24
TILIL		0.0%	5%	Record Date	14-Nov-24
NAHEEACP		0.0%	4%	Record Date	14-Nov-24
INDEXAGRO		0.0%	25%	Record Date	14-Nov-24
BBS		0.0%	1%	Record Date	14-Nov-24
ADNTEL		0.0%	10%	Record Date	17-Nov-24
TITASGAS		0.0%	5%	Record Date	17-Nov-24
SAIFPOWER		0.0%	0%	Record Date	17-Nov-24

Important DSE News
APEXTANRY

(Q1 Un-audited): EPS was Tk. (4.70) for July-September 2024 as against Tk. (2.68) for July-September 2023; NOCFPS was Tk. (3.14) for July-September 2024 as against Tk. (7.72) for July-September 2023. NAV per share was Tk. 40.74 as on September 30, 2024 and Tk. 45.43 as on June 30, 2024. Consolidated EPS was Tk. 3.77 for July-September 2024 as against Tk. 2.20 for July-September 2023; Consolidated NOCFPS was Tk. 14.95 for July-September 2024 as against Tk. 13.11 for July-September 2023. Consolidated NAV per share was Tk. 153.55 as on September 30, 2024 and Tk. 150.06 as on June 30, 2024.

IBP

The Board of Directors has recommended 0.10% Cash Dividend for the year ended June 30, 2024. Date of AGM: 26.12.2024, Time: 11:00 AM, Venue: Hybrid System. Record Date: 03.12.2024. The Company has also reported EPS of Tk. (0.35), NAV per share of Tk. 13.60 and NOCFPS of Tk. 0.29 for the year ended June 30, 2024 as against Tk. 0.07, Tk. 13.96 and Tk. 0.79 respectively for the year ended June 30, 2023.

BDAUTOCA

(Q1 Un-audited): EPS was Tk. 0.02 for July-September 2024 as against Tk. 0.07 for July-September 2023; NOCFPS was Tk. 0.92 for July-September 2024 as against Tk. (0.11) for July-September 2023. NAV per share was Tk. 7.44 as on September 30, 2024 and Tk. 7.41 as on June 30, 2024.

UNIQUEHRL

(Q1 Un-audited): EPS was Tk. 0.44 for July-September, 2024 as against Tk. 0.36 for July-September, 2023. NOCFPS was Tk. 3.29 for July-September, 2024 as against Tk. 5.13 for July-September, 2023. NAV per share was Tk. 88.43 as on September 30, 2024 and Tk. 88.75 as on June 30, 2024.

WMSHIPYARD

(Q2 Un-audited): EPS was Tk. 0.03 for October-December 2023 as against Tk. (0.09) for October-December 2022; EPS was Tk. 0.07 for July-December 2023 as against Tk. (0.06) for July-December 2022. NOCFPS was Tk. 1.26 for July-December 2023 as against Tk. 0.81 for July-December 2022. NAV per share was Tk. 18.30 as on December 31, 2023 and Tk. 20.19 as on December 31, 2022.

VFSTDL

(Q1 Un-audited): EPS was Tk. 0.01 for July-September 2024 as against Tk. 0.02 for July-September 2023; NOCFPS was Tk. (0.03) for July-September 2024 as against Tk. 0.03 for July-September 2023. NAV per share was Tk. 20.26 as on September 30, 2024 and Tk. 20.09 as on September 30, 2023.

MJLBD

(Q1 Un-audited): Consolidated EPS was Tk. 3.43 for July-September 2024 as against Tk. 2.70 for July-September 2023; Consolidated NOCFPS was Tk. 2.85 for July-September 2024 as against Tk. 2.65 for July-September 2023. Consolidated NAV per share was Tk. 51.46 as on September 30, 2024 and Tk. 48.03 as on June 30, 2024.

NPOLYMER

(Q1 Un-audited): EPS was Tk. 0.37 for July-September 2024 as against Tk. 0.60 for July-September 2023; NOCFPS was Tk. 0.99 for July-September 2024 as against Tk. 1.75 for July-September 2023. NAV per share was Tk. 29.95 as on September 30, 2024 and Tk. 30.63 as on June 30, 2024.

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TAMIJTEX

The Board of Directors has recommended 21.00% Cash dividend only for General Shareholders excluding Sponsors & Directors for the year ended June 30, 2024. The quantities of securities held by the said sponsors and/or directors who will not be entitled to recommended dividend: 18,410,596 shares. The amount payable to the general shareholders is Tk. 2,44,73,759.10. Date of AGM: 29.12.2024, Time: 11:00 AM, Venue: Hybrid System. Record Date: 04.12.2024. The Company has also reported EPS of Tk. 6.70, NAV per share of Tk. 96.79 and NOCFPS of Tk. (17.76) for the year ended June 30, 2024 as against Tk. 6.64, Tk. 90.77 and Tk. 5.03 respectively for the year ended June 30, 2023.

APEXFOOT

(Q1 Un-audited): EPS was Tk. 1.98 for July-September 2024 as against Tk. 1.56 for July-September 2023; NOCFPS was Tk. 43.12 for July-September 2024 as against Tk. 48.57 for July-September 2023. NAV per share was Tk. 476.35 as on September 30, 2024 and Tk. 474.37 as on June 30, 2024.

JMISMDL

(Q1 Un-audited): EPS was Tk. 0.73 for July-September 2024 as against Tk. 0.08 for July-September 2023; NOCFPS was Tk. 1.05 for July-September 2024 as against Tk. 1.22 for July-September 2023. NAV per share was Tk. 87.39 as on September 30, 2024 and Tk. 86.66 as on June 30, 2024.

SONARGAON

(Q1 Un-audited): EPS was Tk. 0.02 for July-September 2024 as against Tk. (0.08) for July-September 2023. NOCFPS was Tk. 0.04 for July-September 2024 as against Tk. (0.10) for July-September 2023. NAV per share was Tk. 19.33 as on September 30, 2024 and Tk. 19.31 as on June 30, 2024. Reasons for deviation in EPS, NOCFPS and NAVPS: EPS has increased due to production and sales volume increased in this quarter.

OLYMPIC

(Q1 Un-audited): EPS was Tk. 2.83 for July-September 2024 as against Tk. 2.81 for July-September 2023; NOCFPS was Tk. 3.08 for July-September 2024 as against Tk. 4.42 for July-September 2023. NAV per share was Tk. 56.12 as on September 30, 2024 and Tk. 52.93 as on September 30, 2023.

AMCL(PRAN)

(Q1 Un-audited): EPS was Tk. 1.72 for July-September 2024 as against Tk. 1.71 for July-September 2023. NOCFPS was Tk. (17.40) for July-September 2024 as against Tk. 9.99 for July-September 2023. NAV per share was Tk. 92.62 as on September 30, 2024 and Tk. 90.90 as on June 30, 2024.

ESQUIRENIT

(Q1 Un-audited): Consolidated EPS was Tk. (0.07) for July-September 2024 as against Tk. (0.49) for July-September 2023; Consolidated NOCFPS was Tk. 1.48 for July-September 2024 as against Tk. (0.95) for July-September 2023. Consolidated NAV per share with revaluation was Tk. 65.12 as on September 30, 2024 and Tk. 65.19 as on June 30, 2024. Consolidated NAV per share without revaluation was Tk. 37.40 as on September 30, 2024 and Tk. 37.47 as on June 30, 2024.

BSRMLTD

(Q1 Un-audited): Consolidated EPS was Tk. 3.77 for July-September 2024 as against Tk. 2.20 for July-September 2023; Consolidated NOCFPS was Tk. 14.95 for July-September 2024 as against Tk. 13.11 for July-September 2023. Consolidated NAV per share was Tk. 153.55 as on September 30, 2024 and Tk. 150.06 as on June 30, 2024.

IBNSINA

(Q1 Un-audited): Consolidated EPS was Tk. 2.72 for July-September 2024 as against Tk. 5.22 for July-September 2023; Consolidated NOCFPS was Tk. 9.71 for July-September 2024 as against Tk. 1.20 for July-September 2023. Consolidated NAV per share was Tk. 114.80 as on September 30, 2024 and Tk. 111.94 as on June 30, 2024.

RANFOUNDRY

(Q1 Un-audited): EPS was Tk. 1.17 for July-September 2024 as against Tk. 1.16 for July-September 2023; NOCFPS was Tk. (3.35) for July-September 2024 as against Tk. 0.70 for July-September 2023. NAV per share was Tk. 34.71 as on September 30, 2024 and Tk. 33.54 as on June 30, 2024.

ANWARGALV

(Q1 Un-audited): EPS was Tk. (0.88) for July-September 2024 as against Tk. 1.10 for July-September 2023; NOCFPS was Tk. (1.52) for July-September 2024 as against Tk. 0.34 for July-September 2023. NAV per share was Tk. 9.16 as on September 30, 2024 and Tk. 14.70 as on June 30, 2024.

BSRMSTEEL

(Q1 Un-audited): EPS was Tk. 2.26 for July-September 2024 as against Tk. 1.21 for July-September 2023; NOCFPS was Tk. 5.13 for July-September 2024 as against Tk. 4.86 for July-September 2023. NAV per share was Tk. 82.43 as on September 30, 2024 and Tk. 80.93 as on June 30, 2024.

ALLTEX

(Q1 Un-audited): EPS was Tk. (0.01) for July-September 2024 as against Tk. (0.22) for July-September 2023; NOCFPS was Tk. (0.09) for July-September 2024 as against Tk. 0.24 for July-September 2023. NAV per share was Tk. 19.91 as on September 30, 2024 and Tk. 19.92 as on June 30, 2024.

JHRML

(Q1 Un-audited): Consolidated EPS was Tk. 0.55 for July-September 2024 as against Tk. 0.54 (Solo) for July-September 2023; Consolidated NOCFPS was Tk. 0.14 for July-September 2024 as against Tk. 0.12 (Solo) for July-September 2023. Consolidated NAV per share was Tk. 34.50 as on September 30, 2024 and Tk. 33.95 as on June 30, 2024.

INTRACO

(Q1 Un-audited): Consolidated EPS was Tk. 0.26 for July-September 2024 as against Tk. 0.31 for July-September 2023; Consolidated NOCFPS was Tk. 0.36 for July-September 2024 as against Tk. 0.52 for July-September 2023. Consolidated NAV per share was Tk. 12.52 as on September 30, 2024 and Tk. 12.46 as on September 30, 2023.

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